

1976 - 1977

TOURIST SURVEY

REPORT

OCTOBER 1977 STATISTICS

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ABBREVIATIONS:

Y = WHOLE YEAR

Sd = SHOULDER MONTHS (APRIL, MAY, JUNE, OCTOBER)

Sm = SUMMER MONTHS (JULY, AUGUST, SEPTEMBER)

W = WINTER MONTHS (NOVEMBER, DECEMBER, JANUARY, FEBRUARY, MARCH)

## 1. INTRODUCTION

1.1. The results of the Tourist Survey provide a sound basis for:

- (a) the formulation of the Tourist Office's marketing strategy.
- (b) the analysis of the Tourist market to Gibraltar.
- (c) monitoring the development of tourism in Gibraltar.
- (d) the calculation of tourist expenditure.

1.2. Methodology

### (a) Sampling method

The 1976/77 Tourist Survey was run on the lines of previous surveys. A system of quota sampling was used which precluded the estimation of sampling errors.

The sampling unit was the party of one or more persons travelling together and visiting Gibraltar for business or holiday.

A total of 1527 interviews were satisfactorily completed, divided as follows:

Mode of arrival	No. of interviews	Approx. sampling fraction
Arrivals from UK by air	1036	1 in 16
Arrivals from Morocco	268	1 in 20
Cruise Ship excursionists	<u>223</u>	1 in 74
TOTAL	1527	

### (b) Timing

The survey was conducted between the 1st July 1976 and the 31st June, 1977. It took account of seasonality of the holiday arrangements made by the different sampling units.

Visitors were interviewed at the following points of departure.

- Gibraltar airport (UK and Morocco flights)
- North and South Moles (Cruise Ships)
- Waterport Wharf (Gibraltar - Tangier ferry)

GENERAL

As expected, the economic recession in the United Kingdom, with a high level of unemployment and a fall in real disposable incomes, had a serious effect on Gibraltar's tourist trade. Tourism receipts in 1976 were £4.5 million compared to £4.4 million in 1975 marking a decrease of around 10% in real terms. 1976 was a particularly bad year for hotels. Tourist arrivals at hotels fell by 27% and guest-nights sold by 20%. Hotel expenditure rose by only 5%, from £1.3 million in 1975 to £1.4 million in 1976. The real level of spending by visitors would have dropped further had it not been for increased receipts from visiting yachts and excursionists from Morocco. Indeed expenditure by excursionists from Morocco totalled £416,000, an increase of 76% compared to 1975. This was largely attributable to increased expenditure by shoppers who were by far the highest spenders of visitors to Gibraltar - the number of shopping excursionists rose from 3700 in 1975 to 6040 in 1976 and their expenditure more than doubled from £130,000 in 1975 to £283,000 in 1976. However, the number of yachts calling at Gibraltar rose by 16% and their expenditure by 30%. Spending by cruise passengers, usually a steady growing source of income, fell slightly (from £447,000 in 1975 to £437,000 in 1976, which was particularly disappointing in view of the 10% increase in the number of cruise passengers arriving at Gibraltar.

The reduction in the number of scheduled flights from London and continued wage restraint in the UK together with the extra competitive edge gained by Spanish resorts following the devaluation of the peseta will tend to dampen prospects for tourism in 1977.

/total

### How long and where they stayed

The average length of stay of visitors arriving from UK was 7 days, as in 1975/76. For inclusives, average length of stay was 7 days (8 days during the summer period). Visitors from Morocco stayed 2 days on average; the majority having arrived for an excursion and/or shopping trip for the day only.

Nearly all holiday-makers arriving from UK stayed in hotels featured by Tour Operators; half the total stayed in beach hotels. Holidaymakers making independent arrangements were more inclined to stay in Town hotels.

### How much they spent

Holidaymakers arriving by air from UK spent an average of £7.3 per person per day (£6.3 in 1975/76). Shopping visitors from Morocco were the highest spenders-nearly £47 per person per day. Businessmen were the highest spending group amongst UK arrivals, with an average expenditure of £9 per person per day.

Tourist expenditure for 1976 was estimated at £4.5 million, an increase of 3% over 1975. In real terms however tourist expenditure fell by 10% between 1975 and 1976. Detailed calculations of tourist expenditure is attached at Appendix 'A'.

### What type of tourist

Around 70% of visitors interviewed were over the age of 35, 20% being over 55 years of age (particularly amongst cruise ship excursionists).

### What they thought of Gibraltar

For most categories of visitors around two thirds indicated that they would return to Gibraltar. Many visitors were pleased with their stay.

Various complaints and suggestions were noted and a summary of these is attached at Appendix 'B'.

Tables with detailed statistics are attached at Appendix 'C'.

Expenditure by visitor arrivals at hotels is therefore estimated at £2.9m as follows:

<u>CATEGORY</u>	<u>No. of Air</u>	<u>Av. length of stay day/nights</u>	<u>Av. Exp.</u>	<u>Total Expenditure</u> <u>£000's</u>
<u>Arrivals from Morocco</u>				
hotel expenditure	10131	3 <sup>1</sup>	£5.00	£152.0
other expenditure	10131	3	£12.30	£373.8
<u>Arrivals from UK</u>				
<u>Inclusives</u>				
hotel expenditure	16866	7	£5.70 <sup>2</sup>	£673.0
other expenditure	16866	7	£6.90	£814.6
<u>Independent</u>				
hotel expenditure	3968	7	£9.50	£263.9
other expenditure	3968	7	£7.60	£211.1
<u>Business</u>				
hotel expenditure	3968	5	£10.90	£216.3
other expenditure	3968	5	£8.70	£172.6
Total Expenditure				<u>£2,877.3</u>

1. The average length of stay for staying visitors from Morocco makes allowance for visitors who only stay for one day i.e. excursionists. It was derived as follows:-

$$(10753 \text{ excursionists} \times 1 \text{ day}) + (11,962 \text{ staying visitors} \times y \text{ days}) = 22720 \times 2 \text{ days), so that } y = 2.9$$

2. Average cost of the hotel on an inclusive tour is estimated at £5.7 per person per night (Source: Director of Tourism)

(v) Visitors in Supplementary Accommodation

Out of a total of 40,583 visitors arrivals during 1976, 34933 stayed in hotels. It is therefore assumed that the remaining 5650 stayed in supplementary accommodation, mainly with family and friends

Expenditure is calculated as:-

Category	No of arrivals	Av length of stay day/night	Av. Expenditure per person per day/night	Total Expenditure £
Arrivals from UK	3819	12	6.30	288,716
Arrivals from Morocco	1831	3	12.30	67,564
	<u>5650</u>			<u>356,280</u>

(vi) In transit visitors

There were two types of in transit visitors in 1976, 1439.

- 1439 air passengers from UK to Morocco
- 70 sea passengers from Mons Calpe going by air to UK.

Air passengers may or may not have the opportunity of leaving the aircraft and spend money in Gibraltar. It is practically impossible to work out a reliable estimate of expenditure, although a cautious estimate would be £3 per person per day.

The in-transit passengers from the Mons Calpe have more time and opportunity to spend money in Gibraltar and expenditure by person is estimated at £7.5.

Total expenditure for in-transit visitors is therefore around £5,000.

Summary

Total Tourist expenditure for 1976 is therefore estimated to be £4.54 million i.e.

(i) Visitor arrival at hotels	- 2,877.3
(ii) Excursionists from Morocco	- 415.6
(iii) Excursionists from Cruises	- 437.4
(iv) Visitors on yachts	- 444.9
(v) Visitors in supplementary accommodation	- 356.3
(vi) In-transit visitors	5.0
	<u>4,536.5</u>

Between 1975 and 1976, tourist expenditure rose by 3.2%. In real terms, terms however this represented a 10% drop in expenditure.

1. % of visitors by country of residence
2. % of visitors by areas of residence
3. % of visitors by type and size of party
4. % of visitors by no. of children
5. % of visitors by no. of previous visits
6. % of holidaymakers by location of previous holidays
7. % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar
8. % of holidaymakers staying in a hotel by reason
9. % of visitors by no. of days spent in Gibraltar
10. % of visitors by type of accomodation used
11. % of visitors by opinion of Gibraltar
12. % of visitors by type of holiday arrangements
13. Expenditure excluding hotel and travel costs
14. Expenditure on hotel bill by people making independent arrangements
15. % of visitors by age group of head of party



Table 1: Percentage of visitors by country of residence, 1976 - 77

Category	Season	UK/EIRE	FRANCE	GERMANY	NETHERLANDS	ITALY	D. EUROPE	MOROCCO	USA	CANADA	OTHER
<u>Air UK Arrivals</u>											
Total	Y	92	∅	∅	∅	∅	1	1	1	∅	1
Family/Friends	Y	98	-	-	∅	-	∅	∅	-	-	-
Business	Y	72	1	4	1	1	11	3	4	∅	1
Holiday - All	Y	96	∅	∅	∅	∅	1	∅	∅	∅	1
Holiday - Incl.	Y	97	-	∅	-	-	∅	-	∅	∅	∅
Holiday - Indep.	Y	90	∅	-	-	∅	4	∅	2	1	1
<u>Arrivals from Morocco</u>											
Total	Y	39	4	2	∅	-	5	32	9	3	5
Shopping	Y	3	8	-	-	2	5	75	5	-	2
Other	Y	46	4	2	∅	-	5	22	9	4	6
<u>Cruise Ship Excurst.</u>	Y	62	-	4	2	-	1	-	30	-	1

Source: Statistics Office, Gibraltar.

Table 2: Area of Residence of British visitors - % of visitors by area of residence, 1976 - 77

Area of Residence	Total	Air Arrivals from UK <sup>1.</sup>						FLY/ FRDS.	Arriv from Moroc
		Y	W	Sd	Sm	Busi- ness			
London & S.E.	43	34	38	33	32	60	42	40	
Midlands	13	14	13	14	16	13	12	12	
N. & N.E. England	9	12	8	11	10	7	10	18	
N.W. England	10	10	10	8	9	6	13	EQ	
S.W. England	8	10	8	14	10	6	10	7	
E. Anglia	4	4	5	4	7	3	5	6	
Scotland	8	9	11	8	9	1	8	6	
Wales	4	6	6	6	5	3	-	I	
N. Ireland	1	1	1	2	2	1	-	-	

- Notes:
1. 92% of all air arrivals from UK were UK residents.
  2. 38% of all arrivals from Morocco were UK residents.

Source: Statistics Office, Gibraltar.

Table 3: Type and size of party - % of visitors by type and size of party 1976 - 77

Category	Season	Type of Party					Size of Party					Average
		Alone	Family	Friends	Fly/Frds.	1	2	3	4	5+		
<u>Air UK arrivals</u>												
Total	Y	26	53	16	5	26	52	10	8	4	2.2	
Business	Y	66	18	15	1	66	23	5	3	3	1.6	
Family/Friends	Y	42	42	14	2	42	44	7	6	1	1.8	
Holiday - All	W	12	65	16	7	12	64	10	9	5	2.4	
Holiday - Indep.	Y	16	62	14	8	16	62	12	8	2	2.2	
Holiday - Indep.	W	29	46	18	7	29	48	16	5	2	2.1	
Holiday - Indep.	Sd	12	59	15	14	12	73	-	9	6	2.4	
Holiday - Indep.	Sm	70	78	10	5	7	68	14	11	-	2.3	
Holiday - Incl.	Y	11	66	17	6	11	64	9	10	6	2.4	
Holiday - Incl.	W	14	63	17	6	14	61	8	9	8	2.4	
Holiday - Incl.	Sd	8	60	20	12	8	66	10	11	5	2.4	
Holiday - Incl.	Sm	9	72	16	3	9	67	12	9	3	2.4	
<u>Arrivals from Morocco</u>												
Total	Y	20	57	14	9	20	47	13	9	11	2.7	
Shopping	Y	37	48	15	-	36	45	11	4	4	2.0	
Other	Y	16	60	14	11	16	48	13	10	13	2.8	
Cruise Ship Excursionists	Y	49	5	16	9	18	60	10	7	5	2.3	

Source: Statistics Office, Gibraltar.

Table 4: No. of children in group - % of visitors by no. of children 1976 - 77

Category	Season	No. of children in group	
		None	One or More
<u>Air UK arrivals</u>			
Total	Y	89	11
Business	Y	97	3
Family/Friends	Y	80	20
Holiday - All	Y	87	13
Holiday - Indep.	Y	81	19
Holiday - Indep.	W	71	29
Holiday - Indep.	Sd	87	13
Holiday - Indep.	Sm	86	14
Holiday - Incl.	Y	89	11
Holiday - Incl.	W	88	12
Holiday - Incl.	Sd	89	11
Holiday - Incl.	Sm	89	11
<u>Arrivals from Morocco</u>			
Total	Y	95	5
Shopping	Y	96	4
Other	Y	94	6
<u>Cruise Ship excursionists</u>	Y	93	7

Source: Statistics Office, Gibraltar.

Table 5: Previous visits to Gibraltar - % of visitors by no. of previous visits,  
1976 - 77

Category	Season	0	1	2	3+
<u>Air UK Arrivals</u>					
Total	Y	60	16	8	16
Business	Y	44	11	13	32
Family/Friends	Y	45	16	13	26
Holiday - All	Y	68	18	6	8
Holiday - Indep.	Y	68	17	4	11
Holiday - Indep.	W	70	11	4	15
Holiday - Indep.	Sd	75	17	5	3
Holiday - Indep.	Sm	63	24	3	10
Holiday - Incl.	Y	68	18	6	8
Holiday - Incl.	W	69	15	8	8
Holiday - Incl.	Sd	70	19	7	4
Holiday - Incl.	Sm	65	20	4	11
<u>Arrivals from Morocco</u>					
Total	Y	63	11	4	22
Shopping	Y	27	14	8	51
Other	Y	73	11	3	4
<u>Cruise Ship Excursionists</u>					
	Y	64	13	10	13

Source: Statistics Office, Gibraltar.

Table 6: Location of holiday in previous three years - % of holidaymakers by location of previous holidays, 1976 - 77

Location of holidays in previous three years	Total	Holidaymakers arriving from UK	Holidaymakers arriving from UK		
			Inclusive	Independent	Family/Friend
UK only	24	23	21	30	
One or more outside UK but in E.S.A.	24	21	22	33	
One or more outside E.S.A. but in Europe	41	44	36	32	
One or more outside Europe	12	12	19	6	

Note: 1. E.S.A. - European Sterling Area.

Source: Statistics Office, Gibraltar.

Table 7: Reason for choosing Gibraltar - % of holidaymakers making their first visit to Gibraltar by reason for choosing Gibraltar, 1976 - 77

Reason	Holidaymakers arriving by air UK								
	Total Y	Inclusives				Independent			
		Y	W	Sd	Sm	Y	W	Sd	Sm
Personal recommendation	26	26	21	22	35	28	26	18	35
Travel Agents recommendation	27	29	28	31	28	18	31	23	3
Advertising	19	21	23	22	17	13	8	18	16
Article in Press	8	6	8	3	7	10	8	5	16
Other	20	18	20	22	13	31	27	36	30

Source: Statistics Office, Gibraltar.

Table 8: Reason for coming to Gibraltar - % of holidaymakers staying in a hotel by reason, 1976 - 77

Holidaymakers arriving by air from UK and staying in a hotel

Category	Holiday-All		Holiday Indep.			Holiday Incl.			
	Y	Y	W	Sd	Sn	Y	W	Sd	Sn
<u>Reason</u>									
Sunshine record	48	38	39	49	29	45	45	53	41
British language	10	7	6	5	10	9	9	7	11
British currency	15	12	13	8	14	15	12	11	27
Safe food	2	1	1	-	-	2	2	-	2
Patriotism	3	4	7	-	3	2	3	1	2
Been before and liked it	12	15	13	15	17	10	12	11	6
Called on previous cruise	2	1	1	-	-	2	2	2	2
Other	8	22	20	23	27	15	15	15	15

Note: Some visitors state more than one reason for coming to Gibraltar. Percentage therefore add up to more than 100.

Source: Statistics Office, Gibraltar.



Table 9: Length of stay % of visitors by no. of days spent in Gibraltar, 1976 - 77

Category	Length of stay (days)					
	Season	1	2 - 7	8 - 14	14+	Average
<u>Air UK Arrivals</u>						
Total	Y	4	58	31	7	7
Business	Y	21	67	9	3	5
Family/Friends	W	1	18	52	29	12
Holiday - All	Y	1	64	32	3	7
Holiday - Indep.	Y	3	65	26	6	7
Holiday - Indep.	W	5	70	16	9	7
Holiday - Indep.	Sd	-	72	19	9	7
Holiday - Indep.	Sn	2	56	40	2	8
Holiday - Incl.	Y	-	64	34	2	7
Holiday - Incl.	W	-	69	26	5	7
Holiday - Incl.	Sd	-	70	30	-	7
Holiday - Incl.	Sn	-	53	46	1	8
<u>Arrivals from Morocco</u>						
Total	Y	83	15	2	∅	2
Shopping	Y	87	13	-	-	1
Other	Y	82	15	2	1	2

Source: Statistics Office, Gibraltar.

Table 10: Accommodation Used - % of visitors by type of accommodation used, 1976 - 77

Category	Season	Accommodation Used						No accommodation
		Beach Hotel used by tour operators	Town Hotels used by tour operators	Other Hotels Guest houses	Fly/Frds	Other		
<u>Air UK arrivals</u>								
Total	Y	37	42	3	15	3	-	-
Business	Y	16	67	3	12	12	-	-
Family/Friends	Y	1	1	-	98	-	-	-
Holiday - All	Y	50	45	4	-	1	-	-
Holiday - Indep.	Y	38	46	10	-	6	-	-
Holiday - Indep.	W	13	62	17	-	8	-	-
Holiday - Indep.	Sd	47	39	8	-	6	-	-
Holiday - Indep	Sm	54	37	3	-	6	-	-
Holiday - Incl.	Y	52	45	2	-	1	-	-
Holiday - Incl.	W	49	46	4	-	1	-	-
Holiday - Incl.	Sd	48	52	-	-	-	-	-
Holiday - Incl.	Sn	59	40	1	-	-	-	-
<u>Arrivals from Morocco</u>								
Total	Y	14	23	2	3	2	56	-
Shipping	Y	-	18	-	-	9	73	-
Other	Y	18	25	3	4	-	50	-

Source: Statistics Office, Gibraltar.

Table 11: Opinion of Gibraltar - % visitors by opinion of Gibraltar, 1976 - 77

Category	Season	Opinion of Gibraltar						Will Return
		Excellent	Good	Adoquate	Poor	Will not return	Perhaps	
<u>Air UK arrivals</u>								
Total	Y	29	54	12	3	16	21	62
Family/Friends	Y	41	49	7	7	10	18	73
Holiday - All	Y	27	55	14	3	16	23	60
Holiday - Incl.	Y	28	55	12	3	16	24	60
Holiday - Indep.	Y	24	54	18	3	17	23	60
<u>ARRIVALS from Morocco</u>								
Total	Y	31	55	9	4	12	25	63
Shopping	Y	27	58	9	7	4	15	81
Other	Y	32	55	10	4	14	28	58
<u>Cruise Ship Excursionists</u>								
Total	Y	33	56	8	4	17	14	69

Note: 1. Question not asked to Businessmen.

Source: Statistics Office, Gibraltar.

Table 12: Type of holiday arrangement - % of holidaymakers by type of arrangement '76 - '7

Season	Holidaymakers from the UK			
	Y	W	Sd	Sn
<u>Holiday Arrangement</u>				
Independent	20	16	27	23
Inclusive	30	34	73	77
<u>Inclusive Tour Operators</u>				
Gibraltar Travel	2	-	5	3
Cooks/Golden Wing	9	12	8	7
Exchange Travel	31	29	29	34
Bland Cadogan	24	27	23	20
Sovereign/Silver Wing	30	28	31	32
Other/Don't Know	4	4	4	4

Source: Statistics Office, Gibraltar.

Table 13: Expenditure excluding hotel and travel costs - Average amount spent per person per day (£) 1976 - 1977

Category	Season	Av. Expenditure per person per day (£)
<u>Air UK Arrivals</u>		
Total	Y	£7.3
Business	Y	£9.0
Family/Friends	Y	£6.0
Holiday - All	Y	£7.2
Holiday - Indep.	Y	£7.5
Holiday - Indep.	W	£6.5
Holiday - Indep.	Sd	£9.0
Holiday - Indep.	Sn	£8.3
Holiday - Incl.	Y	£6.8
Holiday - Incl.	W	£7.1
Holiday - Incl.	Sd	£6.8
Holiday - Incl.	Sn	£6.6
<u>Arrivals from Morocco</u>		
Total	Y	£19.0
Shopping	Y	£46.9
Other	Y	£12.3
<u>Cruise Ship Excursionists</u>	Y	£8.3
<u>Visitors from Yachts</u>	Y	£12.0 <sup>1</sup>

Note: 1. Estimated.

Source: Statistics Office

Table 14: Expenditure on hotel bill by people making independent arrangements - av. amount spent per person per night (£) 1976 - 77

Category	Season	Expenditure per person per night
<u>Air UK Arrivals</u>		
Total	Y	£6.4
Business	Y	£10.9
Holiday	Y	£5.7
<u>Arrivals from Morocco</u>		
Total	Y	£4.3
Shopping	Y	£3.8
Other	Y	£3.9

Source: Statistics Office, Gibraltar.

Table 15: Age of Head of Party - % of visitors by age group of head of party, '76 - '77

Category	Season	Under 25	(25 - 34)	(35 - 54)	(55 and over)
<u>Air UK Arrivals</u>					
Total	Y	8	21	49	22
Business	Y	6	26	47	21
Family/Friends	Y	19	25	35	21
Holiday - All	Y	4	20	53	23
Holiday - Indep.	Y	7	19	57	17
Holiday - Indep.	W	9	25	52	14
Holiday - Indep.	Sd	6	26	54	14
Holiday - Indep.	Sn	7	8	65	20
Holiday - Incl.	Y	5	19	52	24
Holiday - Incl.	W	2	18	58	22
Holiday - Incl.	Sd	6	22	47	25
Holiday - Incl.	Sn	8	21	44	27
<u>Arrivals from Morocco</u>					
Total	W	11	31	45	13
Shopping	Y	10	36	42	12
Other	Y	12	29	46	13
<u>Cruise Ship Excursionists</u>					
	Y	3	11	44	42

Source: Statistics Office, Gibraltar.

APPENDIX 'D': QUESTIONNAIRE - Tourist Survey

AIR - UK FLIGHTS

1. What had been the main purpose of your visit to Gibraltar?
  - Holiday .....
  - Visiting Family/Friends .....
  - Business .....
  - Shopping .....
  - Other (Specify) .....
  
2. How did you arrive in Gibraltar?
  - Air from UK .....
  - schedule .....
  - charter .....
  - From Morocco .....
  - Other (Specify) .....
  
3. Are you travelling alone?
  - with family .....
  - with friends .....
  - or with family/friends .....
  
4. How many people in your group? .....
  
5. IF TRAVELLING WITH FAMILY  
How many children in your group? .....
  
6. Is this your first visit to Gibraltar?
  - Yes .....
  - No .....

If NO how many times have you been before? .....
  
7. How many days have you spent in Gibraltar? .....

(Confirm number of nights, above minus one) .....

  
8. Where have you been for your three main annual holidays?
  - most recent .....
  - one before .....
  - one before that .....



9. IF FIRST VISIT TO GIBRALTAR AND ON HOLIDAY (EXCLUDE BUSINESS AND F/F)

How did you get to hear about Gibraltar as a place for a holiday?

- Personal recommendation .....
- Travel agents recommendation .....
- Advertising .....
- Article in Press .....
- Other (Specify) .....

10. What accomodation did you use in Gibraltar?

- Beach Hotels (Both Worlds, Caleta) .....
- Town Hotels used by tours (Holiday Inn, Rock, Bristol, Montarik) .....
- Other hotels, guest houses etc .....
- Other (specify) .....

11. IF ON HOLIDAY AND STAYED IN HOTELS

What attracted you to Gibraltar?

- Sunshine record .....
- British language .....
- British currency .....
- Safe Food .....
- Patriotism .....
- Been before and liked it .....
- Called on previous cruise .....
- Other (Specify)4 .....

12. Did you visit Gibraltar on a package tour?

- Yes .....
- No .....
- IF YES Gib only .....
- or Gib and Morocco .....

13. IF ON PACKAGE TOUR

Which tour operator did you use?

- Cadogan .....
- Cooks/Golden Wing .....
- Exchange Travel .....
- Golden Lion .....
- Sovereign/Silver Wing .....
- Other (Specify) .....

14. ASK OF VISITORS WHO STAYED IN A HOTEL AND WERE NOT ON A PACKAGE TOUR  
How much was the hotel bill for the nights you and your party spent in Gibraltar £.....

(Notes.....  
.....)

15. Excluding hotel bill and cost of travel, how much money did you and your party spent in Gibraltar? £.....

(Notes.....  
.....)

16. ASK OF ALL EXCEPT BUSINESSMEN

What do you think of Gibraltar as a place for a holiday?

- Very Poor .....
- Poor .....
- Adequate .....
- Good .....
- Excellent .....

17. ASK OF ALL VISITORS EXCEPT BUSINESSMEN

Do you think you will come back to Gibraltar?

- Yes .....
- Perhaps .....
- No .....

18. Have you any complaints to make about your visit to Gibraltar or any suggestions for improvements?

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.....  
.....  
.....  
.....

19. Age group of head of party?

- Under 25 .....
- 25 - 34 .....
- 35 - 54 .....
- 55 and over .....

20. Where do you live?

Country .....

If UK which region?

- London & S.E. ....
- Midlands .....
- N & N.E. England .....
- N.W. England .....
- S.W. England .....
- E. Anglia .....
- Scotland .....
- Wales .....
- N. Ireland .....